

ROUTING AND RECORD SHEET				
SUBJECT: (Optional)				
FROM: ADC/OTE 1025 C of C		EXTENSION	NO.	
			DATE	
TO: (Officer designation, room number, and building)	DATE		OFFICER'S INITIALS	COMMENTS (Number each comment to show from whom to whom. Draw a line across column after each comment.)
	RECEIVED	FORWARDED		
1. DD/OTE D/OTE				<p>C/ITD requests approval by Curriculum Committee members of two courses, the Contract Process Course and the Survey of Sub-saharan Africa, to be conducted by the Topical Issues Branch. Because these courses appear to meet the requirements outlined on the New Course Checklist, I do not see the need for a special Curriculum Committee meeting.</p> <p>Would you please review the memos, the course objectives, the course schedules and content and note your concerns or concurrence by 8 November 1985.</p>
2. ADC/OTE				
3. EXO/OTE				
4. C/LT				
5. C/IT				
6. C/ISTD				
7. C/MATD				
8. C/CTD				
9. C/WOTS				
10. C/CBT				
11. C/MPB				
12. C/TSD C/CRB				
13. C/Plans Group				
14. (ISTD)				
15.				

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31 October 1985

MEMORANDUM FOR: Members of the Office of Training and
Education Curriculum Committee

FROM :
Chief, Topical Issues Branch

SUBJECT : Curriculum Committee New Course Checklist

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1. As part of the DS&T Training Program, the Topical Issues Branch (TIB) is planning to conduct a ten day course entitled "Contract Process" in the Chamber of Commerce Building during the period 2-13 December 1985. The objective of this course is to provide DS&T professionals with the skills and information necessary to effectively manage contract programs. This is one of the highest priority courses identified during our DS&T needs assessment which was approved by the DS&T and the Office of Training and Education (OTE).

2. The specific content of the course was identified and validated through our needs assessment of the DS&T using a questionnaire and follow-up interviews with experts from various offices. The course was designed in close coordination with contract experts in the office of Logistics and the DS&T. Although the course is designed for DS&T professional level employees, other directorates may send students on a space-available basis. The maximum size of the class is 15.

3. A variety of instructional methods are planned for this course to include lecture, group discussion, individual and team exercises. Students will also be provided a handbook and other materials for use on the job.

4. The course will be conducted by contract personnel (Mr. Bernard Beskind) with instructional support from TIB and MATD staffs and substantive expertise from the DS&T. Total cost of the course which will initially be funded by the DS&T is \$60,400. Each running of the course will require an estimated 46 man-days of OTE staff time

, and about five man-days of training assistant time

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SUBJECT: Curriculum Committee New Course Checklist

5. The DS&T has expressed strong interest in this course both in our needs assessment and in a recent count of students who would attend the course. The projected demand as revealed in the DS&T FY-86 training program call is for eleven runnings. We may only be able to provide five runnings in FY-86 because of room availability. At this time little marketing is required.

6. Evaluation of the course will be both written and verbal with an intensive end-of-course substantive critique involving both students and staff.



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CONTRACT PROCESS COURSE

1 - 11 December 1985

(1 - 6 December 1985, Out-of-Town)
(9 - 11 December 1985, Room 507 Chamber of Commerce)

Science and Technology Section
Topical Issues Branch
Intelligence Training Division
Office of Training and Education

Staff

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CONTRACT PROCESS COURSE

One of the more critical training requirements to surface during a recent DS&T needs assessment was for skills in managing contracts. This intensive eight day course is designed to provide the Contracting Officer's Technical Representative (COTR) with knowledge and skills to participate in all phases of the contract process, from an initial statement of requirements to delivery. The course is composed of lectures, team activities, video tapes, discussion panels, case studies, and exercises. The program was designed by Bernard Beskind of Learned Systems and experts from the DS&T, the Office of Training and Education, and the Office of Logistics. The objective of this course is to prepare those selected to serve as COTRs for the role and responsibilities incumbent in that position. The major instructional goals are:

1. Familiarize participants with the terminology used in the contract process as prescribed by the Agency Acquisition Handbook (HN and the Federal Acquisition Regulation (FAR)). STAT
2. Explore the key steps in the contract process from the identification of the requirement to contract award, including responsibilities for management reviews of contractor's work, to completion of the contracted effort and phase-in of the deliverables.
3. Describe the budgetary, planning, and control process as it relates to the contracting process.
4. Identify the COTR's responsibilities as related to Agency security regulations throughout the contracting process.
5. Explain management's expectations of the Contracting Officer and COTR in the contracting process.
6. Explain the various contract forms and their characteristics.
7. Examine various methods of tracking cost and schedules in determining tradeoffs.
8. Identify support activities available to assist the COTR and where they are located.
9. Describe success and failure of contract efforts and lessons learned.
10. Familiarize participants with procedures for verification and testing.
11. Provide participants basic skills in writing a Statement of Work (SOW), developing a Work Breakdown Structure, a Specifications Statement, and Source Selection Plan.

Upon completion of this learning experience, the participant will be able to:

1. Prepare a Statement of Work (SOW), Work Breakdown Structure, Requirement Specifications, and Source Selection Plan and Criteria.
2. Discuss the COTR's role and function as a team member in the selection, awarding, and managing of a contract.
3. Describe the procedures used to establish/define a requirement through the budgetary and planning process.
4. Acknowledge their responsibilities for maintaining appropriate security procedures in planning, evaluating, awarding, and managing a contract effort and the COTR's relationship to the Security Officer.

CONTRACT PROCESS COURSE
SCHEDULE

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Sunday, 1 December 1985

1300-1350	<u>Introduction and Overview</u> In this session, the staff and students will introduce themselves, and administrative details, course materials, and schedule will be explained.	<u>Bernard Beskind</u> <u>Learned Systems</u> [Redacted] Office of Training and Education, CIA [Redacted] Former DS&T Contracting Officer STAT
1400-1445	The DDS&T, and the DS&T Contracting Officer will open the course with comments on their perceptions of The COTR and his/her role in the DS&T.	<u>Evan Hineman</u> Deputy Director for Science and Technology, CIA [Redacted] STAT Contracting Officer, DS&T, CIA
1445-1500	<u>BREAK</u>	STAT
1500-1550	<u>Panel Discussion: DS&T Contract Activities</u> A panel composed of senior technical officers with the DS&T will discuss the diversity of contract arrangements used to meet the various mission objectives and types of problems with which the DS&T must deal.	[Redacted] DS&T Contracts Officer 1 - Contracting 2 - Senior Technical Officers STAT
1600-1630	<u>The Contracting Officer's Technical Representative</u> During this segment, a general description of the COTR will be formulated to make the participants sensitive to their responsibilities.	[Redacted]

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1800-1900

The Contract Process

The instructor will briefly review the steps involved in the Contract Process to include requirements definition, budgeting, contract definition, source selection and execution.

Bernard Beskind

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1900-2000

Exercise: Requirement Principles

This session will examine the requirements process, how they are identified, validated, and staffed. To illustrate this process, the class will use as an example a pocket calculator.

Bernard Beskind

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Monday, 2 December 1985

0830-1030

Exercise: Statement of Work

This session will focus on the components of a Statement of Work (SOW) and why these properties are important. The instructors will use the pocket calculator example to show the various relationships.

Bernard Beskind

1030-1040

BREAK

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1040-1200

Exercise: Cost and Schedule Analysis

We will discuss various principles of cost and schedule (spread sheet) analysis and show how to determine respective tradeoffs. The instructors will illustrate this process using the calculator example.

Bernard Beskind

1200-1330

LUNCH

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1330-1600

Exercise: Tradeoff in Cost/Schedule/Performance

The class, working in teams, will prepare a statement of work and do a cost and

Bernard Beskind

schedule analysis using the calculator example. Each team will present the results of their effort to the class for discussion and feedback.

1800-2000 DS&T Support Activities

A panel of representatives from various the various elements who support the COTR effort will discuss their responsibilities. This discussion will be followed by an open forum.

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Chief, Administrative Staff, DS&T, CIA

Tuesday, 3 December 1985

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0830-1000 Requirements Definition

This session will examine the various aspects of a requirement to include function, performance, systems engineering, life-cycle support, testing, project status reporting, and development standards.

Bernard Beskind

1000-1010 BREAK

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1010-1100 Concept of Operations

The instructors will discuss the process through which requirements are transformed into a specifications document, who is responsible for this transformation, and how it is accomplished.

Bernard Beskind

1100-1200 Exercise: Requirements Development

The class, working in teams, will be given a packet of information including a statement of need, schedule, cost constraints, and data on individual component performance. Each team will "package" the

Bernard Beskind
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proposal and defend the desirability of meeting some but not all requirements considering the cost and schedule constraints.

1200-1330 LUNCH

1330-1450 Exercise: Requirements Development (Cont'd)

The exercise continues.

1450-1500 Break

1500-1600 The Legal Side of Contracts

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In this session, the class will be made aware of the procurement laws and regulations under which the Agency receives authority to contract for goods and services.

Chief, Legal &
Legal Procurement
Division/Office of
Logistics

1800-2000 DS&T Experience with Stand-Alone Software Systems

TBA

A panel of experts from various DS&T offices will discuss their experiences--specific case studies--with stand alone software contracts this discussion will be followed by an open forum.

3 - Senior Technical
Officers (NPIC)

Wednesday, 4 December 1985

0830-0930 Contract Documentation

Bernard Beskind

The instructor will describe the contractor data requirements list and have it used by the DS&T.

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0930-0940 Break

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0940-1130 Developing an Acquisition Plan Bernard Beskind

Our speaker will review and discuss issues involved in the development of an acquisition plan, including sole source vs. competition, use of multiple contracts, government provided support and market surveys.

1130-1300 LUNCH STAT

1300-1400 Estimating Costs Bernard Beskind

This session will focus on those elements which relate to cost, such as the work breakdown structure. How the various cost elements impact on the project/program schedule, how to identify assumptions, and what kinds of information are required will be discussed.

1400-1410 Break STAT

1410-1600 The Budget and Finance Process

This session will trace the funding submission and approval path through the DS&T. Our speakers will describe what is required for this process and where to get specialized help.

1800-2000 DS&T Experiences with Standalone Hardware TBA

A panel of representative from various DS&T Offices will discuss their experiences - case studies- with hardware contracts. This discussion will be followed by an open forum.

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Thursday, 5 December 1985

0830-0950 Contract Types

This session will present to the student the various types of contracts used to acquire the various goods and services required to meet the mission of the DS&T.

0950-1000	<u>BREAK</u>	STAT
1000-1200	<u>Statement of Work Preparation</u> During this session, the different approaches to preparing SOWs will be described. The substantive content of SOWs differs depended on whether a product or a study/research project is involved.	Bernard Beskind <div style="border: 1px solid black; height: 20px; width: 100%;"></div>
1200-1330	<u>LUNCH</u>	STAT
1330-1430	<u>Proposal Evaluation Plan</u> Our speaker will present a technique for objectively evaluating contract proposals and discuss logistical and staffing considerations.	Bernard Beskind <div style="border: 1px solid black; height: 20px; width: 100%;"></div>
1430-1440	<u>BREAK</u>	STAT
1440-1600	<u>Proposal Evaluation Process</u> The Agency has a defined process under which all proposals are evaluated in response to RFPs. During this session, this process will be discussed to make the student familiar with source evaluation.	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>
1800-2000	<u>DS&T Experience with Large Scale Systems</u> A panel of representatives from various DS&T offices will discuss their experiences--specific case studies--with large scale contracts. This discussion will be followed by an open forum.	<u>TBA</u> 5 Senior Officer Technical Officers (1 OD&E) (2 NPIC) (2 OSO)

Friday, 8 December 1985

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0830-1020 Preparing a Request for Proposal (RFP)

During this session, the student will become familiar with documentation necessary to compose an RFP, as well as the process of solicitation.

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1030-1100 COTR Support to Fact-Finding and Negotiations

This session will focus on the role of the COTR in support of fact finding and during negotiations. The COTR plays a significant role in determining the scope of the effort, pricing structure, and the contractor's track record.

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1100-1200 Getting Started

The speaker will discuss some of the problems a COTR encounters in getting started.

Bernard Beskind

1200-1300 Lunch1300-1600 Return to Washington D.C.Monday, 9 December 1985

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0830-1200 Exercise: Proposal Evaluation

Bernard Beskind

For this exercise, the class will be given general evaluation criteria, a baseline requirements document, and a set of cost, management, and technical criteria. Working in teams, they will evaluate a proposal, providing scoring on their criteria elements, and report their rankings to the class. Each of the three proposals will be consolidated and the final rankings discussed.

1330-1430 Role of the Agency Contract Review Board

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Our speaker will address the necessity of review by the Agency Contract Review Board (ACRB) and how it functions as a review board.

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1440-1600 Design Review: Tracking Technical Progress

Bernard Beskind

In this session, the instructors will describe how to effectively conduct and participate in a design review. Key topics to be discussed include planning agendas, what documents to bring, and what to look for during the interchange

Tuesday 10, December 1985

STAT

0830-1000 Assessing Technical Risk

Bernard Beskind

The instructors will focus on the risk elements inherent in mechanical, electrical, computer and software systems and how to assess them.

1000-1010 BREAK

1010-1200 Tracking Cost and Schedule

The instructors will review and explain several techniques to use in monitoring a project. These techniques include Gantt charts, PERT charts, resource constrained schedules, cost reports, and value-added systems.

1200-1330 Lunch

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1330-1430 Concept Design Review

1440-1600 Preliminary Design Review

Bernard Beskind

The Preliminary Design Review (PDR) permits all parties to assess initial progress and work out potential problems. The instructor will discuss this process,

how to plan for it, what data is needed,
and how to interpret what the other side
is saying.

Wednesday, 11 December 1985

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0830-1000 Exercise: Preliminary Design Review Bernard Beskind

The class will be provided background source materials on an exercise case study and will witness a "mock" PDR. At the conclusion of the PDR, the students will be asked to identify weaknesses and to formulate specific action items to resolve these problems.

1000-1010 Break

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1010-1100 Critical Design Review Bernard Beskind

The Critical Design Review (CDR) is used to work out problems that have surfaced during the contract process. Our instructor will provide information on this interaction, how to plan a CDR, and what to look for.

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1100-1200 Requirements Verification and Testing Bernard Beskind

This session will focus on methods of verification and testing as well as how to manage the process. Also discussed will be test plans and procedures.

1200-1330 LUNCH

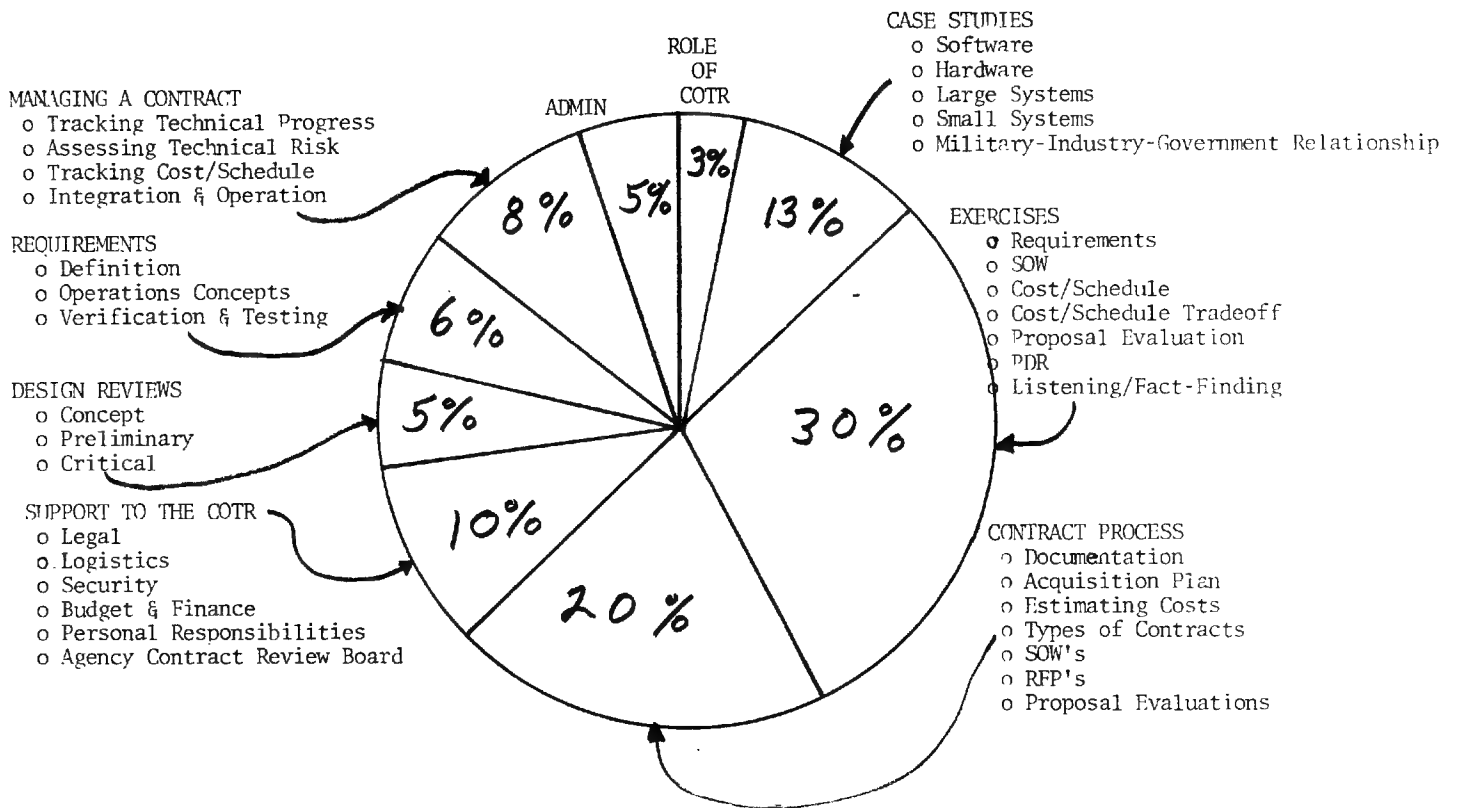
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1330-1430 Integration and Operation of Large Scale Systems Bernard Beskind

Our instructor will discuss the management of large scale systems and identify some of the more important aspects. These include facility planning, integration testing, impact of cost and schedule, transition problems and risks, as well as impact on the overall mission.

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1440-1600	<u>Course Evaluation</u>	Bernard Beskind <div></div>
1600-1700	<u>Informal Discussions and Dinner</u> During this period, snacks, and a catered buffet dinner will be provided.	<u>Class & Staff</u>
1800-2000	<u>Government-Military-Industry Relationships</u> Representatives from the DoD and private industry will join DS&T representatives in an open discussion of the working relationships between these entities.	<u>TBA</u>



OTE SPECIAL BULLETIN

SUBJECT: Contract Process Course, 1-11 December 1985

The Office of Training and Education (OTE) is offering an intensive eight-day course entitled "Contract Process" as part of the DS&T Training Program. The course will be held in the Chamber of Commerce Building, 2-11 December 1985, and conducted by contract personnel from Learned Systems with instructional support and substantive expertise from OTE and the DS&T.

The course is designed to provide the Contracting officers' Technical Representative (COTR) with knowledge and skills to participate in all phases of the contract process, from an initial statement of requirements to delivery. This first running has been tailored for COTRs in the DS&T and requires an SI/TK access. Other directorate personnel may attend on a space-available basis. The class will be limited to 15-20 participants. For further information call [redacted] on extension [redacted]

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Submit Form 73's (Request for Internal Training) to Central Registrations, OTE, Room 802, Chamber of Commerce Building as soon as possible for the above running. This course normally requires a four-week registration deadline. The schedule of this course for FY-86 is as follows:

2-11 December 1985
24 February-5 March 1986
2-11 June 1986
21-30 July 1986
25 August-4 September 1986

1 November 1985

MEMORANDUM FOR: Members of the Office of Training and Education
Curriculum Committee

FROM:

[redacted]
Chief, Topical Issues Branch

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SUBJECT: Curriculum Committee New Course Checklist

1. The Topical Issues Branch (TIB) is planning to conduct a five-day course titled "Survey of Sub-Saharan Africa" during the period 9-13 December 1985, in the Chamber of Commerce Building. The objective of the course is to provide knowledge about African society--economics, politics, military, geography--and then to examine key intelligence issues of high concern, such as the South Africa question and the problem of drought and famine. This course is one of a series in our Regional and Societal Training Program, open to intelligence officers from all directorates.

2. The immediate impulse for the course was the canvas of the DS&T completed by [redacted]. That survey revealed a high S&T interest in a basic survey of Africa, and follow-up interviews and sessions with S&T officers confirmed this need.

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3. While we thus expect the majority of students to be from the DS&T, we will market the course throughout the Agency and anticipate enrollees from other directorates. Because the information needs of officers from the DI and DO are similar to those of certain S&T offices--particularly NPIC and FBIS--we see no problem with accommodating them in the course.

4. The course is designed to provide basic information about Africa, a focus on the most important recent intelligence concerns, and, finally, briefings on health, living conditions, the operational environment, and other concerns of those going out to Africa TDY or PCS. Methods of instruction will include lectures and discussions, video presentations, individual mapwork, lunch in an Ethiopian restaurant, and a class debate on US policy in South Africa.

SUBJECT: Curriculum Committee New Course Checklist (Cont'd)
Page 2

5. Both the course content and the methods of instruction have been reviewed in two sessions with professionals from OTS, FBIS, NPIC, OSO, and the ODDS&T, including the directorate's Senior Training Officer/Career Development Officer. The first session involved generating ideas about what should be in the course. The second was review of the proposed outline for substantive validation.

6. Following completion of the S&T canvas, serious work on the course began in September, involving substantial time from the two full-time staffers in the Regional and Societal Training Program, as well as from an NPIC rotatee who is working both with the Regional Program and also with TIB's S&T Training Program. We estimate costs for the December running at \$1,900, to include \$600 for guest lecturers, \$1,000 for transportation, \$200 for maps and videos, and \$100 for other supplies.

7. Building on relationships already established, we will market the course in the DS&T, DI and DO, through personal visits to appropriate supervisors and managers, and calls and visits to training officers. The NPIC rotatee can be especially valuable in carrying out this marketing process. As soon as the course is approved by the Curriculum Committee, we will also issue the attached special bulletin for distribution throughout the Agency.

8. In addition to end-of-course written evaluations by students, we plan to hold follow-up sessions with selected course participants and with some of the managers and training officers we have contacted in preparing the course. We discussed this plan for post-course evaluation with the latter, and they were sympathetic to the idea. Allowing for the absence of some of these people during the holiday season which immediately follows the December running, we should have recommendations on the future of the course in mid-January.

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Attachments: Special Bulletin
Course Outline

SPECIAL BULLETIN

TO:

SUBJECT: Survey of Subsaharan Africa

In order to put current headliner events in this region in perspective, the Office of Training and Education (OTE) is offering a Survey of Subsaharan Africa. The principal objective of the course is to provide information about African society--economics, politics, geography, and military matters--and then to examine key intelligence issues of high concern, such as the South Africa question and the problem of drought and famine. The course will also include information on health, living conditions, the operational environment, and other concerns of those going out to Africa TDY or PCS.

The course will consist primarily of lectures/discussions led by specialists from the Agency, other government departments, and the academic and business community. We will also have video presentations, individual mapwork, lunch in an Ethiopian restaurant and a class debate on US policies and business interests in South Africa. The program will particularly emphasize student participation through discussions and the debate.

While this course originated in response to a training needs canvas of the DS&T, the survey is designed for intelligence officers from all directorates. Any professional employee who could benefit from an examination of African issues is encouraged to apply. For further information on this or other courses in OTE's Regional and Societal Training Program, call [REDACTED]

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STATCOURSE DATA

Length:	one week, full-time
Date:	9 - 13 December 1985
Location:	Chamber of Commerce Building
Class size:	ten (10) minimum; twenty (20) maximum
Participants:	Agency professional employees working on Africa or those with upcoming assignments in the region
Registration:	Form 73 (Request for Internal Training) must be received in Central Registration, OTE, 822 Chamber of Commerce Building, no later than 25 November.

BLOCK MANAGER: _____

COURSE: Survey of Subsaharan Africa

ASSISTANT BLOCK MANAGER: _____

BLOCK TITLE: _____

BLOCK DATES: 9-13 December 1985

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Monday - 9 Dec.	Tuesday - 10 Dec.	Wednesday - 11 Dec.	Thursday - 12 Dec.	Friday - 13 Dec.
830-900 Introduction	830 - 930 Map exercise	830 - 1000 Economics & Agriculture	830 - 1000 South Africa: the Internal System	830 - 945 West Europe's Continuing Role in Africa
915-1000 What is Africa?	945 - 1115 Nation States & the colonial legacy	1015 - 1115 Famine & Population	1015 - 1145 South Africa & the Outside World	
1015-1200 Geography		1130-1200 Film on African drought & famine		1130 - 1215 Preparation time for class debate
1200-100 Lunch (optional film: Life in a Traditional African Village)	1115 - 145 Lunch in an Ethiopian restaurant	1200 - 100 Lunch (optional film: Living in Senegalese desert town)	1145 - 1245 Lunch (optional video: The Afrikaners: Africa's White Tribe)	1215 - 115 Lunch
100-215 Traditional Africa (pre-colonial)	145 - 315 Tribalism & Personalized Rule	100 - 215 Society & Social Issues	1245 - 215 Soviet & Cuban Activities in Africa	115 - 215 US Policy in Subsaharan Africa
230-400 Colonialism & comparative colonial systems	330 - 430 The Military & Military Rule	230 - 400 Life in Africa Today (panel of PCSers from E. & W. Africa)	230 - 345 Islam & Arab Involvement in Africa	230 - 400 Student debate on US Role in South Africa:
400-430 Introduction to class debate		400 - 430 Preparation time for class debate	345- 430 Preparation time for class debate	1) USG Policy 2) US business & divestiture